

Are you a retiree, beneficiary or a former member who received payments from TRS in 2015, such as annuity payments, death benefits, or a refund? If so, TRS will begin mailing 1099R forms for tax year 2015 in January 2016.

Explanations of all of the boxes on your 1099R form are found on the back side of the form. Because TRS receives many questions about some of those boxes, we have explained some of them below.

☐ CORRECTED (if checked)

PAYER'S name, street address, city or town, state or province, country, and ZIP or foreign postal code <b>TEACHER RETIREMENT SYSTEM OF TEXAS</b> <b>1000 RED RIVER STREET</b> <b>AUSTIN, TEXAS 78701-2698</b>		1 Gross distribution <b>Total amount paid to you by TRS</b> 2a Taxable amount <b>Total taxable amount paid to you by TRS</b>		OMB No. 1545-0119 <b>2015</b> Form 1099-R	Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.
PAYER'S federal identification number <b>74-6000164</b>	RECIPIENT'S identification number	2b Taxable amount not determined <input type="checkbox"/>	Total distribution <input type="checkbox"/>	<b>Copy C</b> For Recipient's Records	
RECIPIENT'S name		3 Capital gain (included in box 2a) \$	4 Federal income tax withheld <b>Total amount of income tax withheld</b>		This information is being furnished to the Internal Revenue Service.
Box 5 is the difference in Box 1 and 2a - this is the amount you received from TRS for which you have already paid taxes		5 Employee contributions/ Designated Roth contributions or insurance premiums \$	6 Net unrealized appreciation in employer's securities \$		
Box 7 is the distribution code which identifies the type of benefit - see the reverse side of your 1099R for a description of the code		7 Distribution code(s) <input type="checkbox"/> IRASRP SIMPLE	8 Other <input type="checkbox"/> %		
Street address (including apt. no.), city or town, state or province, country, and ZIP or foreign postal code		9a Your percentage of total distribution %	9b Total employee contributions \$		
10 Amount allocable to IRA within 5 years \$	11 1st year of design. Roth contrib.	12 State tax withheld \$	13 State/Payer's state no.	14 State distribution \$	
Account number (see instructions)		15 Local tax withheld \$	16 Name of locality	17 Local distribution \$	
Form 1099-R (Keep for your records.)		www.irs.gov/form1099r		Department of the Treasury - Internal Revenue Service	

**\*\*\*For TRS purposes: Box 5 does not represent the insurance premium deducted from your TRS annuity, nor does the form from TRS have anything to do with Roth IRA contributions. If you need the insurance premium amount for your tax preparation, this information is available online at the TRS Web site if you are registered for MyTRS. If you don't have access to the internet, please contact the appropriate health benefit office. For TRS-Care, call 1-888-237-6762. If you have coverage through the Employees Retirement System, University of Texas or Texas A&M, call them directly.**

To change your tax withholding preference online, you must be registered for MyTRS. Click on the "MyTRS Login" button located on the TRS home page and follow the steps to establish your own User ID and password. Once you are registered, simply login and select Modify Withholding Preference. Otherwise, to change your withholding preference please complete and submit TRS 228A, Income Tax Withholding Form. The form (along with the current tax tables) is available from the forms page of the TRS Web site ([www.trs.state.tx.us](http://www.trs.state.tx.us)) under "Forms for TRS Retirees and Beneficiaries". You may also call 1-800-223-8778 to request the form through our automated telephone system.

TRS cannot provide tax advice. Therefore, we recommend that you contact a tax preparer or an agent of the IRS for such advice.

**Internal Revenue Service (IRS)**  
**Phone: 1-800-829-1040**  
**IRS Web Site: [www.irs.gov](http://www.irs.gov)**

TRS will mail the 1099R form to your address on file with TRS. If you have not received your copy by mid-February, there are several other ways to obtain a copy.

- View and print your 1099R online at the TRS Web site ([www.trs.state.tx.us](http://www.trs.state.tx.us)). You must be registered for MyTRS to be able to access your form. Follow the instructions above to register. Once you are registered you will see menu options on the left hand side to view your 1099R after one business day. **RETIREEES AND BENEFICIARIES WITH A PASSWORD ARE THE ONLY ONES WHO CAN VIEW AND PRINT THE 1099R.**
- With your MyTRS User ID and password, you can also request to have TRS notify you when your 1099-R form is available.
- Call TRS toll-free at 1-800-223-8778 and use the automated telephone system. Have your Social Security number available. Follow the menu prompts to request that a 1099R form be mailed to you. We will only send the copy to the home address we have on file for you.
- Send a letter to TRS (1000 Red River St, Austin, TX 78701-2698). If you have moved, TRS must have your address change *in writing*. Therefore, you will need to request a duplicate 1099R along with your written address change. Please include your Social Security number and signature on the request.